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Germany

Tobacco and Products

Annual

2003

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Report Highlights:
German tobacco consumption is estimated at 162,000 MT annually of which about 30,000 MT or 18.5 percent are of U.S. origin. Germany produces only about 9,000 to 9,500 MT of filler type raw tobacco annually. German cigarette production remained at a high of 212.5 billion in 2002. Despite an increase in tobacco product taxes, German consumption of cigarettes and roll-your-own products remains high. The German government plans to increase cigarette taxes by about 55 percent within the next three years.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

In 2002, German tobacco growers harvested 10,443 tons of green weight tobacco which is 3.9 percent less than in 2001. About 46 percent of the production is Virginia flue cured tobacco. Since the revision of the EU tobacco regime, German growers have gradually increased their flue cured area at the expense of dark air cured and burley tobacco. Aside from higher EU production premiums, flue cured tobacco is also less labor intensive than the two other varieties grown in Germany. Total tobacco production value amounted to Euro 42.9 million in 2002. Due to inferior weather conditions German tobacco growers suffered from the scattered presence of blue mold.

Cigarette production declined in 2002 to 212.5 billion versus 213.8 billion in 2001. Exports of cigarettes remained high - 105.2 billion versus 105.8 billion in 2001. Prime countries of destination are Spain, Italy and France. Domestic consumption of cigarettes is estimated at 175.2 billion, an increase of about 100 million over 2001. German taxation statistics report a 1.8 percent increase in taxed cigarettes, to 145.1 billion pieces. Also the taxed consumption of fine-

cut tobacco went up by twelve percent to 15,473 tons, mainly fine-cut for roll-your-own cigarettes. Consumption of pipe tobacco dropped by 8.4 percent to 847 tons. Reports for the first quarter of 2003 indicate that domestic consumption of cigarettes as well as production for exports dropped by five to six percent.

Total raw tobacco consumption is estimated at 162,000 tons, of which 30,000 tons was U.S. tobacco. U.S. tobacco sales to Germany in 2002 totaled Euro 238 million (US$225 million) versus Euro 286 million ($256 million) in 2001. It is expected that in 2003 domestic tobacco buyers will lower their flue cured purchases because of high U.S. prices. U.S. flue cured will be substituted most likely by Brazilian tobacco. Also U.S. burley will be increasingly substituted by African burley tobacco.

Note: in recent years the US$/Euro exchange rate has been as follows:

1999: $1 = Euro 0.9380	2002: $1 = Euro 1.0575
2000: $1 = Euro 1.0827	May 2003 $1 = Euro 0.8500
2001: $1 = Euro 1.1160	

Production

German raw tobacco production is estimated at 10,443 tons green weight in 2002, a reduction of 3.9 percent from 2001. Crop quality was satisfactory. Due to unfavorable weather conditions, strong heat in early June followed by rainy and cool weather, German tobacco had been infested with blue mold in scattered regions. Luckily crop losses were not significant.

Total production area in 2002 was reported at 4,727 hectares and it is forecast to rise marginally to 4,740 hectares in 2003. German tobacco growers slightly reduced their production area for dark-air cured Geudertheimer and for Burley tobacco, but increased planting area of lower yielding but less labor intensive flue cured Virgin tobacco. Based on EU regulation 2848/98, the EU harvest of green tobacco is recalculated on the base of harmonized moisture levels of 22 percent for Burley, 26 percent for Geudertheimer dark air cured, and 16 percent Virginia flue cured tobacco. Production data used in this report is based on the EU harmonized moisture levels.

EU support payments for tobacco production in Germany amount to Euro per kilogram green tobacco:

Virgin	1.52397
Burley	1.21904
Geudertheimer	1.22

Tobacco growers in the northern part of Europe receive an additional premium to compensate them for less favorable growing conditions, Euro per kilogram:

Virgin	0.28141
Burley	0.4511
Geudertheimer	0.28141

High production premiums for Virgin tobacco explain the production shifts away from less supported varieties such as Burley and Geudertheimer. About 75 percent of returns from tobacco production come from EU budgets and only roughly 25 percent are generated from product sales. Actual German production of Virgin tobacco well exceeds its maximum allowed quota of 3,000 tons green weight established by the EU. However, the EU tobacco regime provides that in such cases, production of other varieties must underfill their quota at this respective level. Additionally, EU regulations require that such quota shifts have to be cost neutral to the EU budget. Total premium volume is fixed by the base quota distribution as laid down in EU 2848/98.

Table 1: Tobacco Production in Germany								
	Area Planted				Production			
	Hectares				Metric tons			
	1999	2000	2001	2002	1999	2000	2001	2002
Virgin	2,109	2,196	2,318	2,435	4,345	4,607	4,760	4,807
Burley	964	968	937	931	2,747	2,702	2,620	2,323
Geudertheimer	1,473	1,413	1,369	1,362	4,163	3,860	3,725	3,313
Total	4,546	4,577	4,623	4,727	11,254	11,169	11,105	10,443
	Average Price				Total Returns			
	Euro per MT				1,000 Euro			
	1999	2000	2001	2002	1999	2000	2001	2002
Virgin	4,191	4,170	4,320	4,350	18,209	18,777	19,858	20,904
Burley	4,333	4,264	4,330	4,380	11,901	11,385	10,768	10,186
Geudertheimer	3,560	3,553	3,570	3,550	14,819	13,237	12,426	11,762
Total	3,992	3,932	3,963	4,100	44,930	43,399	43,052	42,852
Source: German Tobacco Growers Association								

Consumption

German raw tobacco consumption including homogenized sheet in 2002 is roughly estimated at 162,000 MT, of which the cigarette industry consumes about 145,000 MT. The tobacco use per cigarette is calculated at about 0.7 grams. The use of U.S. tobacco dropped by an estimated 11,000 MT to only 30,000 MT in 2002. This seems to be the result of the restructuring and consolidation process of the cigarette industry in Europe. Since the tobacco processing industries do not provide any tobacco utilization and storage data, the above numbers are only very rough estimates.

Cigarettes

According to official statistics, German cigarette production dropped marginally to 212.5 billion cigarettes in CY 2002. Nearly half of the domestic production is for export markets, predominantly in Spain and Italy. German taxation statistics indicate that consumption of taxed cigarettes increased 1.8 percent to a near record level of 145.2 billion. Private industry research estimates a total cigarette consumption of 175.2 billion in CY 2002, which is 0.1 percent above the 2001 level. This number includes about 10.5 billion legally and illegally imported products which are not officially recorded, compared to about 13 billion in 2001. It is estimated that the amount of illegally imported cigarettes has dropped slightly because smugglers can receive higher returns in Great Britain than in Germany due to Britain's high tobacco taxes.

The consumption of fine-cut tobacco rolls dropped dramatically to 800 million in 2002 compared to 3.2 million in 2001. This product is no longer produced in Germany since the tax advantage for this product had been cancelled by the end of 2001. Smokers switched to fabricated cigarettes (up 1.8 percent) and to other low-tax fine-cut products such as cigarillo sticks (up 20 percent).

Problematic to the German cigarette market is the growing price sensitivity of German consumers in general. The market share of low priced trade chain brands grew by another 12 percent in 2001 to 22 billion cigarettes or 19.6 percent of the German cigarette market. In particular, food discounters gained additional market shares in the sale of cigarettes. The price advantage of private labels over branded products ranges between 20 and 30 percent. This is a strong enough incentive that not only low-income people but also more affluent people switched over to low-price generic products. The growth of the low-price segment was at the expense of vending machine sales which exclusively offer branded products. The vending machine market share dropped from 23.8 percent in 2001 to 22.9 percent in 2002. Ten years ago, about 40 percent of all cigarettes were sold through vending machines.

Since many smokers are one-pack-a-day smokers, the industry launched big packs of 24 or more cigarettes in the beginning of the 90s. This strategy turned out to be very successful. During the past six years big packs more than doubled their market share to 21.1 percent in 2002 with further growth to 22.8 percent reported for the first quarter of 2003. Since the summer of 2002, these big packs are also offered through vending machines where they gained a market share of 0.3 percent during this short period. The price advantage of big packs versus normal size packs of 18 to 20 cigarettes is only marginal.

The long lasting growth of the light cigarette market share came to an end in 2001. It dropped slightly to 31.6 percent in 2002 versus the peak of 32.0 percent in 2000. The full-flavor segment has been regaining market shares since 2001. Actually, today's full-flavor cigarettes are very similar to light cigarettes of ten to fifteen years ago since the EU limited the maximum nicotine and condensate levels considerably.

Per capita consumption is still trending upward despite rising cigarette prices. For 2002, the German Statistics Office reports a per capita consumption of 1,761 versus 1,678 cigarette five years ago. Also per capita consumption of cigarillos and fine-cut tobacco is trending upward. Alarming reports say that the starting age of smokers has fallen to a young 12.5 years. Also, the share of smoking among young girls and women is rising. A recent study shows that already more young girls start smoking than boys.

Table 2: Trends in the German Cigarette Market - % Market Shares						
	1997	1998	1999	2000	2001	2002
Big Packs	10.2	11.6	13.4	16.2	19.1	21.1

Quality/Price Segments						
Premium Price Brands	0.1	0.1	0.1	0.1	0.2	0.2
Most Favored High Price Segment	53.1	52.1	50.2	47.5	44.7	43.9
Medium Price Segment	23.5	23.5	23.9	23.8	23.3	23.0
Upper Low Price Segment	7.6	7.9	8.3	9.2	8.6	8.1
Low Price Segment	15.7	16.4	17.5	19.4	23.3	24.8
Type of Cigarettes						
Non-Filter	3.4	3.2	3.0	2.8	2.6	2.4
Light Cigarettes	28.2	29.5	30.9	32.0	31.8	31.6
Full Flavor	68.4	67.2	66.1	65.2	65.6	66.0
Source: Die Tabak-Zeitung						

Anti-Smoking Efforts

The relationship between smokers and non-smokers is relatively relaxed in Germany. The base for the coexistence of smokers and non-smokers is the principle of tolerance. There are no smoking bans at the workplace, in official buildings, or in bars and restaurants. However, workers have the right to a smoke-free workplace. In addition, the German national rail company recently started a pilot program to keep station platforms smoke-free. At such railway stations, smokers are only permitted to smoke in especially designated areas.

In cooperation with the cigarette industry, the German Ministry of Health has implemented a list of voluntary soft-pressure anti-smoking rules which include

no tobacco product advertisement in the immediate neighborhood of schools
no free cigarette samples
no cigarette commercials in movie theaters before 18.00h
no supportive health related advertisements
no advertisements directed to juveniles
no use of advertisement material which is common in the world of juveniles
no advertisement with prominent people and competitive athletes
no advertisement in competition sports
no advertisements in youth print media, sports arenas, public transportation and airplanes
restricted use of the terms mild and light
no illuminated advertisement

Since April 2003, it is no longer permitted to sell cigarettes to youths less than 16 years of age. Anyone younger than 16 years is also prohibited from smoking in public areas. Beginning January 2007, outdoor vending machines have to be equipped with reading devices for money cards, which will prohibit money card holders younger than 16 years from purchasing cigarettes. As a result the number of outdoor vending machines will likely be significantly reduced. The current number of vending machines amount to about 800,000. With respect to the European Commission's intention to generally prohibit tobacco advertisements, Germany continues to oppose such efforts since it claims that health protection falls under member state authority and is therefore not subject to EU regulations.

The EU tobacco product directive 2001/37 EC will prohibit the use of the terms 'light' and 'mild' and requires larger health warnings as of October 2003. Industry experts expect that this may result in increasing sales of stronger cigarettes.

Since April 2002, German fine-cut tobacco companies started to label nicotine and condensates levels on fine-cut tobacco packages. Previously, only cigarette manufacturers were required to do this. The industry will use a matrix of condensate and nicotine values, differentiating between thin and thick roll-your-own cigarettes and for use of different types of wrapping papers.

Taxation

All tobacco products are subject to a 16 percent value added tax (VAT) in addition to product specific tobacco taxes.

- Cigarettes
  - Euro 6.17 per 100 cigarettes
  - Plus a proportional tax portion calculated as 24.23 percent of the retail sales price
  - This does not include 16% VAT.
- Cigars and cigarillos
  - Euro 1.30 per 100 cigars and cigarillos
  - Plus a proportional tax of one percent of the retail price
  - (excl. VAT)
- Smoking tobacco
  - Fine-cut tobacco
  - Euro 21.40 per kilogram
  - Plus 18.32 percent of retail price
  - Minimum Euro 35.00 per kilogram (excl. VAT)
  - Pipe tobacco
  - Euro 10.70 per kilogram
  - Plus 13,5 percent of retail price
  - (excl. VAT)

Tax revenues in 2002 amounted to Euro 13.93 billion, an increase of 13.9 percent over 2001. Tobacco taxes are the fourth single most important revenue source for the federal budget, following income tax, VAT and gasoline tax.

Late May 2003, the German government released plans to increase the cigarette tax in three steps by a total of one Euro per pack of twenty cigarettes within in the next three years. The revenues from this steep tax hike is intended to cover budget deficits of the German health care system. Government finance experts expect that cigarette consumption will drop by 20 percent as result of the tax hike. In addition, tobacco market experts fear that such a dramatic tax induced price increase will result in significantly increased purchases of low-priced trade-chain brands. German politicians hope to raise an additional Euro 4.5 billion of tax revenues. However, Finance Ministry experts seem to be more realistic forecasting only additional tax revenues of Euro 2.8 billion.

Already during the past two years German cigarette taxes had been raised considerably by one Euro cent per cigarette effective Jan.1, 2002 and 2003. These additional revenues are supposed to cover increased security costs to protect against terrorist threats. While the tax increase of Jan 2002 did not affect consumption, the second tax hike in 2003 lowered cigarette purchases during the first four months by 3.4 percent. Although statistics are not available, it is assumed that an increasing number of cigarette purchases are being ordered via mail orders through the internet from neighboring low-tax EU countries. The legality of these internet import purchases is questionable. The Finance Ministry claims that it is illegal and buyers are at risk to be penalized. It is expected that the German tobacco tax law will be revised soon to stop these profitable imports. Buyers have a price advantage of up to 30 percent due to the differing tax levels of the individual EU member countries.

Table 3: Tobacco Product Consumption and Taxes							
		1997	1998	1999	2000	2001	2002
Volume of Taxed/Consumed Tobacco Products							
Cigars/Rillos	mill pcs	1,592	1,992	2,289	2,557	2,511	3,068
Cigarettes	mill pcs	137,677	138,388	145,265	139,625	142,546	145,145
Fine-cut	tons	11,656	12,150	12,682	12,758	13,803	15,473
Pipe Tobacco	tons	1,039	1,003	983	909	925	847
Tobacco Rolls	tons	2,477	2,602	1,314	1,853	2,469	0
Total Returns by Product							
Cigars/Rillos	mill Euro	343	406	917	507	499	566
Cigarettes	mill Euro	17,665	18,327	19,579	19,176	19,861	21,578
Fine-cut	mill Euro	682	718	743	741	810	1,058
Pipe Tobacco	mill Euro	99	97	98	92	95	86
Tobacco Rolls	mill Euro	322	345	180	249	329	0
Total	mill Euro	19,111	19,893	21,517	20,765	21,595	23,287
Tax Returns							
Cigars/Rillos	mill Euro	29	32	35	39	38	46
Cigarettes	mill Euro	10,223	10,494	11,155	10,836	11,437	13,203
Fine-cut	mill Euro	304	318	331	331	367	496
Pipe Tobacco	mill Euro	25	24	24	22	23	21
Tobacco Rolls	mill Euro	209	220	113	158	210	0
Total	mill Euro	10,790	11,088	11,658	11,386	12,074	13,765
Average Retail Prices							
Cigars/Rillos	Euro/piece	0.2153	0.2040	0.2050	0.1983	0.1988	0.1843
Cigarettes	Euro/piece	0.1300	0.1324	0.1350	0.1373	0.1393	0.1487
Fine-cut	Euro/kg	58.51	59.05	58.59	58.08	58.71	68.36
Pipe Tobacco	Euro/kg	95.37	97.04	99.34	101.47	102.32	101.96
Tobacco Rolls	Euro/kg	130.09	132.53	137.13	134.23	133.50	0.00
Average Tax							
Cigars/Rillos	Euro/piece	0.0183	0.0158	0.0153	0.0153	0.0153	0.0148
Cigarettes	Euro/piece	0.0742	0.0757	0.0768	0.0776	0.0802	0.0910
Fine-cut	Euro/kg	26.05	26.13	26.08	25.97	26.57	32.06
Pipe Tobacco	Euro/kg	23.78	23.93	24.13	24.43	24.55	24.46

Tobacco Rolls	Euro/kg	84.10	84.72	85.95	85.19	84.99	0.00
Source: FedMinFinance							

Trade

In previous tobacco reports German raw tobacco import data was taken from arrival statistics prior to customs clearance. A major portion of the raw tobacco imports used to be stored in these customs warehouses before they were cleared by customs and directly after that processed. Due to the growing consolidation of the European tobacco and cigarette businesses during recent years, raw tobacco purchase, storage and movement decisions have been altered considerably. Tobacco buying has been concentrated into one central unit of each company. These central purchase and storage units distribute the raw tobacco to the individual processing facilities in Europe. This implies that raw tobacco purchased for processing in a German cigarette plant may be stored for several months or longer at a storage facility in Great Britain or in the Netherlands before it is transshipped to Germany. National arrival statistics therefore no longer reflect actual tobacco trade with Germany. A further consolidation of raw tobacco purchasing and handling is expected with EU enlargement in 2004.

Data used in the PS+Ds of this report is from customs after the tobacco had been customs cleared. This implies that the raw tobacco may have already been in European tobacco storage for a year or longer. In 2002, total German raw tobacco imports, including homogenized sheet, amounted to 201,709 MT at a total value of Euro 828 million. This compares to 217,885 MT in 2001. Purchases from the United States amounted to 36,584 MT in 2002 versus 47,335 MT in 2001. The reduction occurred mainly in sales of flue cured tobacco. One German cigarette manufacturer reports that he is hardly buying U.S. tobacco including burley any longer. Supposedly, U.S. tobacco is too expensive compared to Brazilian and African tobacco. It is also claimed that the quality advantage of U.S. flue cured and burley no longer yields the price premium of over 100 percent. Political problems in Zimbabwe forced the tobacco industry to search for alternative supplies. Reportedly, tobacco production and marketing is increasing in Uganda, Mozambique and Tanzania. Also, Malawi is seen as a safe supplier of high quality tobacco.

Table 4: 2001 German Leaf Tobacco Trade by Type			Customs Statistics	
Import Summary	Total		U.S. Share	
	MT	Euro 1,000	MT	Euro 1,000
Flue Cured, Virgin	68,478	311,086	19,083	139,017
Burley	37,239	173,065	11,347	93,431
Maryland	713	6,103	683	5,895
Kentucky Fired Cured	34	90	2	15
Oth. Fire Cured	615	4,086	0	3
Oth. Light Air Cured	13,244	47,936	28	107
Oriental	24,032	112,013	0	0
Dark Air Cured	1,105	3,721	0	3
Oth. Flue Cured	19,419	58,360	0	1
Other Tobacco	7,073	54,077	5,295	31,125
Stems and Scraps	27,069	16,786	4,555	3,168
HTL	18,864	38,303	6,342	13,049
Total	217,885	825,626	47,335	285,814
Export Summary				
Flue Cured, Virgin	14,113	52,321	0	0
Burley	5,724	17,812	0	0
Maryland	0	0	0	0
Kentucky Fired Cured	0	0	0	0
Oth. Fire Cured	322	3,338	0	0
Oth. Light Air Cured	10,379	40,926	0	0
Oriental	6,468	25,801	0	0
Dark Air Cured	1,590	3,079	734	1,239
Oth. Flue Cured	1,764	4,814	11	44
Other Tobacco	5,943	31,534	0	0
Stems and Scraps	9,581	7,279	603	573
HTL	5,794	12,624	30	335
Total	61,678	199,528	1,378	2,191

Table 5: 2002 German Leaf Tobacco Trade by Type			Customs Statistics	
Import Summary	Total		U.S. Share	
	MT	Euro 1,000	MT	Euro 1,000
Flue Cured, Virgin	69,426	334,662	15,885	128,115
Burley	33,437	165,973	9,576	84,444
Maryland	710	5,946	682	5,732
Kentucky Fired Cured	64	215	3	39
Oth. Fire Cured	678	4,428	5	25
Oth. Light Air Cured	13,108	51,319	4	19
Oriental	25,429	118,768	0	0
Dark Air Cured	1,012	3,829	0	3
Oth. Flue Cured	16,549	55,149	246	657
Other Tobacco	1,732	27,506	244	647
Stems and Scraps	20,107	12,877	3,506	2,315
HTL	19,457	47,430	6,433	15,563
Total	201,709	828,102	36,584	237,559
Export Summary				
Flue Cured, Virgin	15,528	57,054	19	24
Burley	8,544	27,161	0	0
Maryland	0	0	0	0
Kentucky Fired Cured	45	68	0	0
Oth. Fire Cured	297	3,200	0	0
Oth. Light Air Cured	6,441	27,728	0	0
Oriental	6,637	31,813	13	41
Dark Air Cured	1,493	2,728	967	1,634
Oth. Flue Cured	1,231	3,366	0	0
Other Tobacco	6,786	31,236	0	0
Stems and Scraps	12,898	7,861	850	404
HTL	4,275	12,446	76	928
Total	64,175	204,661	1,925	3,031

Marketing

The consolidation of the cigarette industry in Europe resulted in a stricter economic orientation of tobacco buying. In addition to this, the share of low-priced cigarette sales is increasing and cigarette manufacturers are increasingly forced to economize their input purchases. This limits the marketing opportunities for high-priced U.S. tobaccos. However, the reduction of maximum tar and nicotine levels of EU cigarettes may provide good chances for continued U.S. burley tobacco sales to Germany since only U.S. burley seems to provide sufficient flavor for tasty cigarettes.

Table 6: PS+D Table Total Unmanufactured Tobacco

PSD Table						
Country	Germany					
Commodity	Tobacco, Unmfg., Total				(HA)(MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		01/2001		01/2002		01/2003
Area Planted	4623	4623	4665	4727	0	4740
Beginning Stocks	34241	34241	10217	11734	11761	11761
Farm Sales Weight Prod	10864	10864	11150	10443	0	11100
Dry Weight Production	9293	9293	9544	8950	0	9500
U.S. Leaf Imports	41900	41000	37000	30000	0	28000
Other Foreign Imports	205166	159000	220000	152000	0	160000
TOTAL Imports	247066	200000	257000	182000	0	188000
TOTAL SUPPLY	290600	243534	276761	202684	11761	209261
Exports	102592	56000	85000	60000	0	40000
Dom. Leaf Consumption	6800	6800	7000	7000	0	7000
U.S. Leaf Dom. Consum.	40991	41000	39000	30000	0	30000
Other Foreign Consump.	130000	128000	134000	125000	0	125000
TOTAL Dom. Consumption	177791	175800	180000	162000	0	162000
TOTAL Disappearance	280383	231800	265000	222000	0	202000
Ending Stocks	10217	11734	11761	11761	0	7261
TOTAL DISTRIBUTION	290600	243534	276761	233761	0	209261

Table 7: Trade Matrixes Total Unmanufactured Tobacco

Import Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Total		
Time period	CY	Units:	MT
Imports for:	2001		2002
U.S.	40991	U.S.	29916
Others		Others	
Brazil	31223	Brazil	34233
Zimbabwe	21122	Zimbabwe	22903
Malawi	17128	Malawi	17618
Turkey	10915	Turkey	14287
Greece	13522	Greece	8334
Italy	15271	Italy	8309
Argentina	6408	Argentina	7860
Tanzania	5413	Tanzania	5572
Spain	6053	Spain	2276
France	5432	France	4180
Total for Others	132487		125572
Others not Listed	26533		26776
Grand Total	200011		182264

Export Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Total		
Time period	CY	Units:	MT
Exports for:	2001		2002
U.S.	1349	U.S.	1849
Others		Others	
Netherlands	15108	Netherlands	13142
Russia	11118	Russia	8943
Switzerland	3237	Switzerland	2929
Romania	4664	Romania	2188
France	4369	France	7130
Ukraine	2940	Ukraine	5098
Belgium	2498	Belgium	2982
Great Britain	2737	Great Britain	1821
Greece	1053	Poland	4879
Italy	804	Tunesia	1907
Total for Others	48528		51019
Others not Listed	6006		7030
Grand Total	55883		59898

Table 8: PS+D Unmanufactured Flue Cured Tobacco

PSD Table						
Country	Germany					
Commodity	Tobacco,Unmfg.,Flue Cured				(HA)(MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		01/2001		01/2002		01/2003
Area Planted	2270	2318	0	2435	0	2450
Beginning Stocks	12195	12195	7331	3155	0	1331
Farm Sales Weight Prod	4760	4713	0	4807	0	4900
Dry Weight Production	4236	4195	0	4278	0	4361
U.S. Leaf Imports	22000	19083	0	15885	0	15000
Other Foreign Imports	60000	49395	0	53541	0	55000
TOTAL Imports	82000	68478	0	69426	0	70000
TOTAL SUPPLY	98431	84868	7331	76859	0	75692
Exports	25000	14113	0	15528	0	14000
Dom. Leaf Consumption	3600	3600	0	4000	0	4000
U.S. Leaf Dom. Consum.	19500	19000	0	15000	0	15000
Other Foreign Consump.	43000	45000	0	41000	0	41000
TOTAL Dom. Consumption	66100	67600	0	60000	0	60000
TOTAL Disappearance	91100	81713	0	75528	0	74000
Ending Stocks	7331	3155	0	1331	0	1692
TOTAL DISTRIBUTION	98431	84868	0	76859	0	75692

Table 9: Trade Matrixes Unmanufactured Flue Cured Tobacco

Import Trade Matrix			
Country	Germany		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	CY	Units:	MT
Imports for:	2001		2002
U.S.	19083	U.S.	15885
Others		Others	
Brazil	20559	Brazil	24351
Zimbabwe	13290	Zimbabwe	15017
Tanzania	4056	Tanzania	4448
Italy	2961	Italy	1365
Canada	1767	Canada	941
Spain	1482	Spain	862
Malawi	1299	Malawi	1293
France	2475	France	2914
Uganda	741	Uganda	689
Total for Others	48630		51880
Others not Listed	765		1661
Grand Total	68478		69426

Export Trade Matrix			
Country	Germany		
Commodity	Tobacco,Unmfg.,Flue Cured		
Time period	CY	Units:	MT
Exports for:	2001		2002
U.S.	0	U.S.	19
Others		Others	
Netherlands	6513	Netherlands	5183
Russia	2195	Russia	2715
Belgium	1520	Belgium	1517
Ukraine	328	Ukraine	1071
Poland	214	Poland	1022
Great Britain	921	Spain	687
Egypt	653	Egypt	1162
Ireland	305	Ireland	624
Total for Others	12649		13981
Others not Listed	1464		1528
Grand Total	14113		15528

Table 10: PS+D Unmanufactured Burley Tobacco

PSD Table						
Country	Germany					
Commodity	Tobacco, Unmfg., Burley				(HA)(MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		01/2001		01/2002		01/2003
Area Planted	940	937	0	931	0	930
Beginning Stocks	5603	6895	5282	5014	0	1130
Farm Sales Weight Prod	2620	2534	0	2496	0	2550
Dry Weight Production	2279	2204	0	2323	0	2219
U.S. Leaf Imports	12500	11347	0	9576	0	9000
Other Foreign Imports	30000	25892	0	23861	0	25000
TOTAL Imports	42500	37239	0	33437	0	34000
TOTAL SUPPLY	50382	46338	5282	40774	0	37349
Exports	9000	5724	0	8544	0	5000
Dom. Leaf Consumption	1600	1600	0	1600	0	1600
U.S. Leaf Dom. Consum.	11500	11000	0	9500	0	9000
Other Foreign Consump.	23000	23000	0	20000	0	20000
TOTAL Dom. Consumption	36100	35600	0	31100	0	30600
TOTAL Disappearance	45100	41324	0	39644	0	35600
Ending Stocks	5282	5014	0	1130	0	1749
TOTAL DISTRIBUTION	50382	46338	0	40774	0	37349

Table 11: Trade Matrixes Unmanufactured Burley Tobacco

Import Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Burley		
Time period	CY	Units:	MT
Imports for:	2001		2002
U.S.	11347	U.S.	9576
Others		Others	
Malawi	11856	Malawi	12770
Brazil	5414	Brazil	5038
Italy	4349	Mozambique	1275
Uganda	1900	Uganda	1006
Guatemala	1041	Guatemala	1624
France	1077	France	982
Total for Others	25637		22695
Others not Listed	255		1166
Grand Total	37239		33437

Export Trade Matrix			
Country	Germany		
Commodity	Tobacco, Unmfg., Burley		
Time period	CY	Units:	MT
Exports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
Netherlands	3653	Netherlands	3504
Italy	586	Austria	275
Romania	381	Romania	526
Poland	225	Poland	1610
Russia	150	Russia	2095
Turkey	88	Turkey	128
		Ukraine	165
Total for Others	5083		8303
Others not Listed	641		241
Grand Total	5724		8544

Table 12: PS+D Cigarettes

PSD Table						
Country	Germany					
Commodity	Tobacco, Mfg., Cigarettes				(MIL PCS)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		01/2001		01/2002		01/2003
Filter Production	210293	210293	215000	209100	0	207700
Non-Filter Production	3500	3500	3400	3400	0	3300
TOTAL Production	213793	213793	218400	212500	0	211000
Imports	40528	40528	40000	35895	0	36000
TOTAL SUPPLY	254321	254321	258400	248395	0	247000
Exports	105808	105808	110000	105231	0	105000
Domestic Consumption	148513	148513	148400	143164	0	142000
TOTAL DISTRIBUTION	254321	254321	258400	248395	0	247000

Table 13: Trade Matrixes Cigarettes

Import Trade Matrix			
Country	Germany		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	CY	Units:	Mill. Pcs
Imports for:	2001		2002
U.S.	60	U.S.	48
Others		Others	
France	5027	France	6383
Netherlands	8291	Netherlands	6220
Great Britain	2742	Great Britain	2698
Denmark	1799	Denmark	1528
Austria	8666	Austria	8801
Belgium	6099	Belgium	3622
Luxemburg	6838	Luxemburg	6422
Portugal	724		
Total for Others	40186		35674
Others not Listed	104		103
Grand Total	40350		35825

Export Trade Matrix			
Country	Germany		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	CY	Units:	Mill. Pcs
Exports for:	2001		2002
U.S.	57	U.S.	108
Others		Others	
Spain	31708	Spain	30865
Italy	17136	Italy	14059
France	10150	France	9143
Great Britain	7036	Great Britain	5874
Greece	4342	Greece	5005
Netherlands	4342	Netherlands	7000
Belgium	5719	Belgium	5960
Taiwan	5008	Taiwan	3886
Japan	2274	Japan	1691
Czech Rep	2136	Czech Rep	1644
Total for Others	89851		85127
Others not Listed	15900		19996
Grand Total	105808		105231